

STRATEGIC ACTION PLANNING GROUP ON AGING Implementation Subcommittee

August 7, 2017

Participants: Mindy Kemp (Co-chair), Natalie Wood (Co-chair), Jim Riesberg, Doug Krug, Dave Norman, Jayla Sanchez-Warren, John Barry, Sallie Thoreson, Mitch Fittro, Steve Child, Lisa Carlson (facilitator)

Update regarding HB17-1253 and Senior \$afe

(Jillian Samaro/Gerald Rome (DORA))

- Creates a mandatory reporting requirement for broker dealer, investment advisors (receive immunity if they report).
- They can contact a 3rd party to help if they need assistance
- Gives them the ability to delay the disbursement of funds (up to 15 days)
- After 15 days, the Commission can extend it for 25 days
- Have opened 6 cases for suspected exploitation in implementing since July 1st.
- 2 delayed disbursement cases are pending
- Will be tracking data by county, who receives information and the age of the people.

Senior \$ave Program:

- Training for financial professionals to identify red flags for exploitation and abuse
- Training includes who to make report to and what happens (anatomy of and investigation)
- Was up and running before the bill came into effect
- Have conducted more than 15 trainings to date and are scheduling more
- There is a consumer version of it for seniors that talks about how to avoid exploitation and where the resources are
- Training sessions are typically one hour but there is an extended presentation of 2 hours
- There are 3 people that can present the training
- Go to askdora.colorado.gov to find out about more about trainings

What can SAPGA do?

- Spread the word among industry that this is a requirement
- Make sure that APS and law enforcement are aware, particularly in smaller county and rural counties.
- Identify needs in particular communities and let DORA know

- Jillian will be on Western Slope next week and will be in other rural areas as well—spread the word
- Doug will contact Colorado Chief's of Police or Sheriff's Office (Lisa will send contact to Doug Krug.)
- Peg Rodgers/Mindy will get info to APS staff and will add presentation to their quarterly trainings done by Webinar (Include Jillian in this)
- AAA Network/Directors should be contacted

More information? Contact Jillian.Sarmo@State.co.us Phone: 303-894-2878

Review and refine Action Plan Spreadsheet

[A spreadsheet is available in *Google Docs* or on by request]

Next steps:

- Next Meeting: August 29, 2017
 - Public Guardianship (Mindy)
 - Letter for respite Care
 - Sponsor for Leg Caucus
 - Meeting from Grand Junction